

Integrated Digital Marketing: The New Marketing Workhorse **MOMENTUM** 2023 ANNUAL MEETING & EXPO

Renaissance Schaumburg Convention Center - Schaumburg, IL

Presenters



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MOMENTUM 2023 ANNUAL MEETING & EXPO

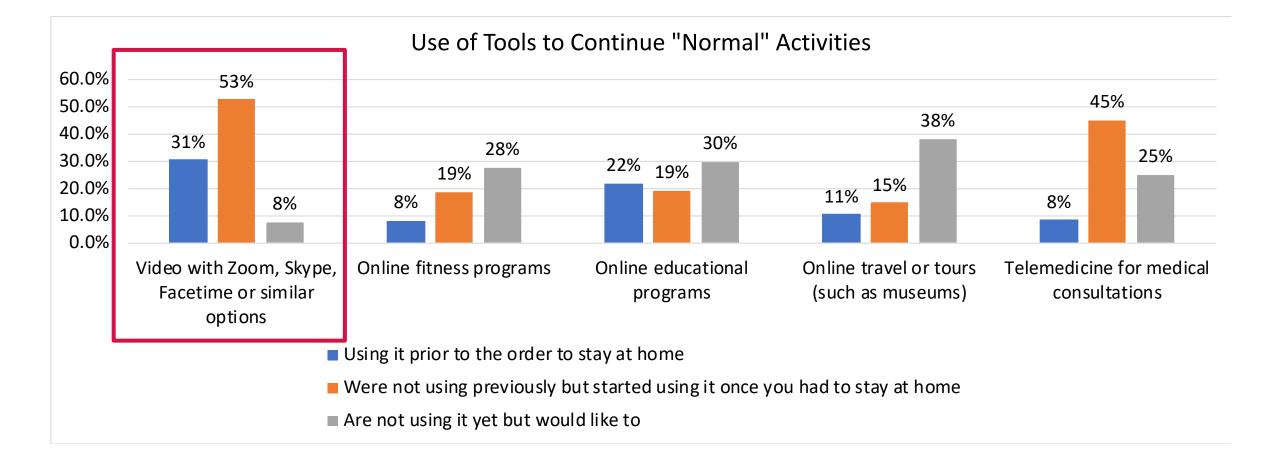
SETTING THE STAGE



Sales By Lead Source: Trends

1990s	2000s	2010s	2020s
Word of Mouth	Word of Mouth	Word of Mouth	Word of Mouth
Direct Mail	Websites	Digital Marketing	Digital Marketing
	Direct Mail		
		Direct Mail	
Offline Ads			
	Offline Ads		Direct Mail

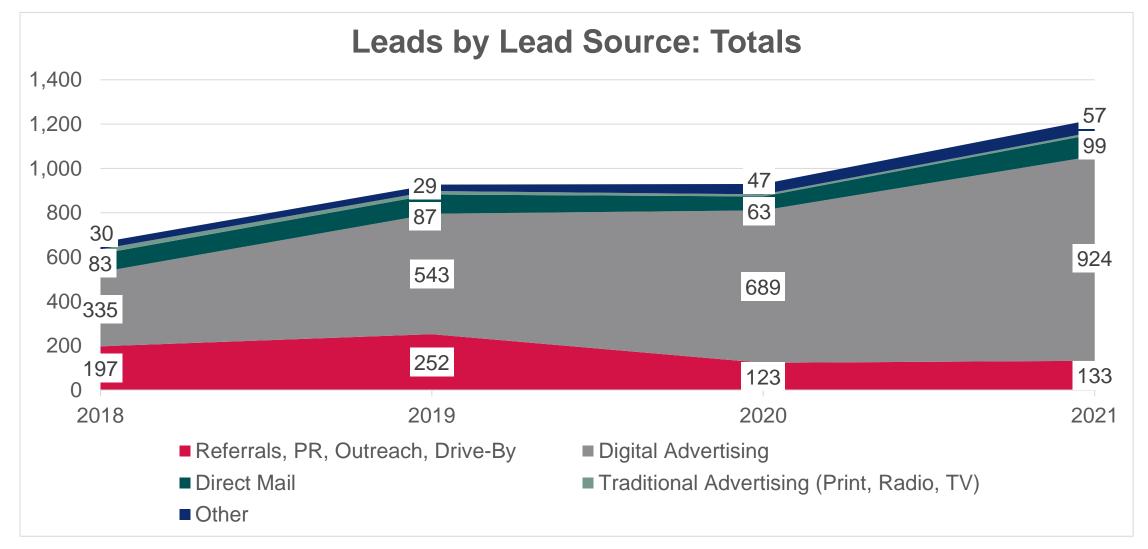
2020 Wait List/Lead Base Survey



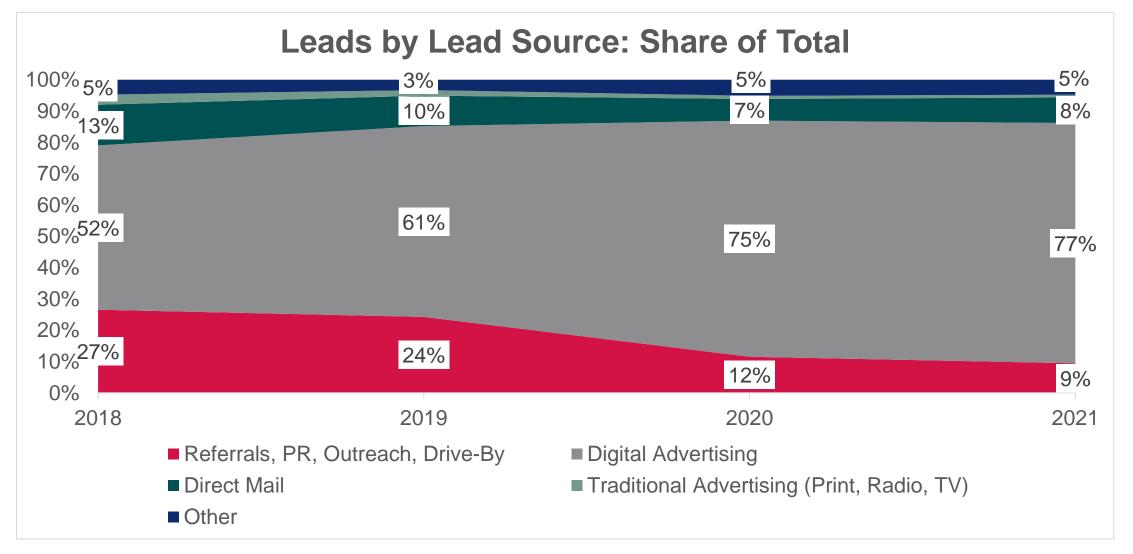
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AIWAYS

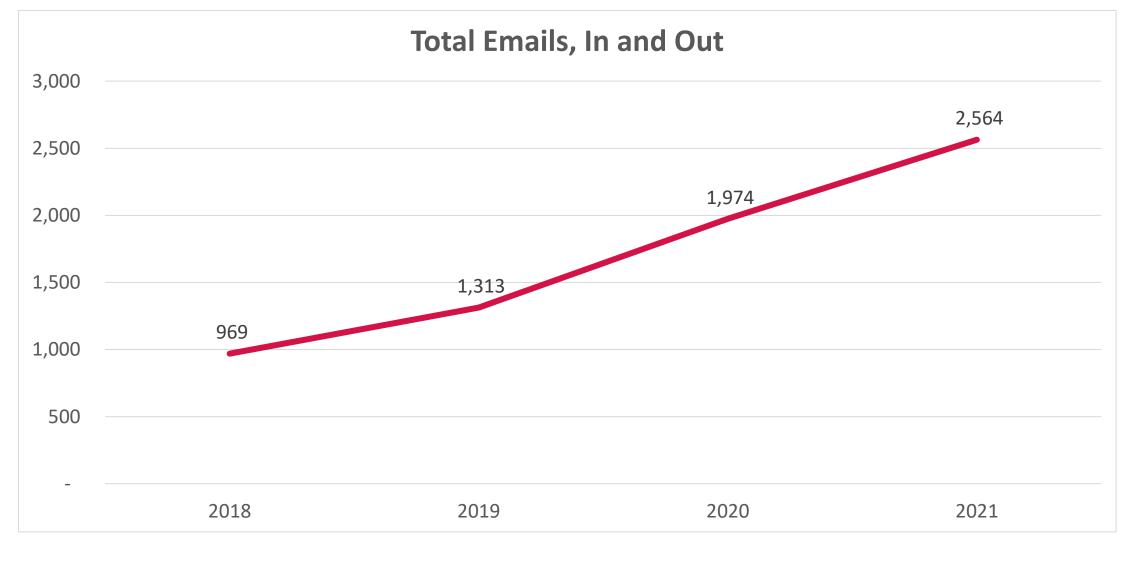
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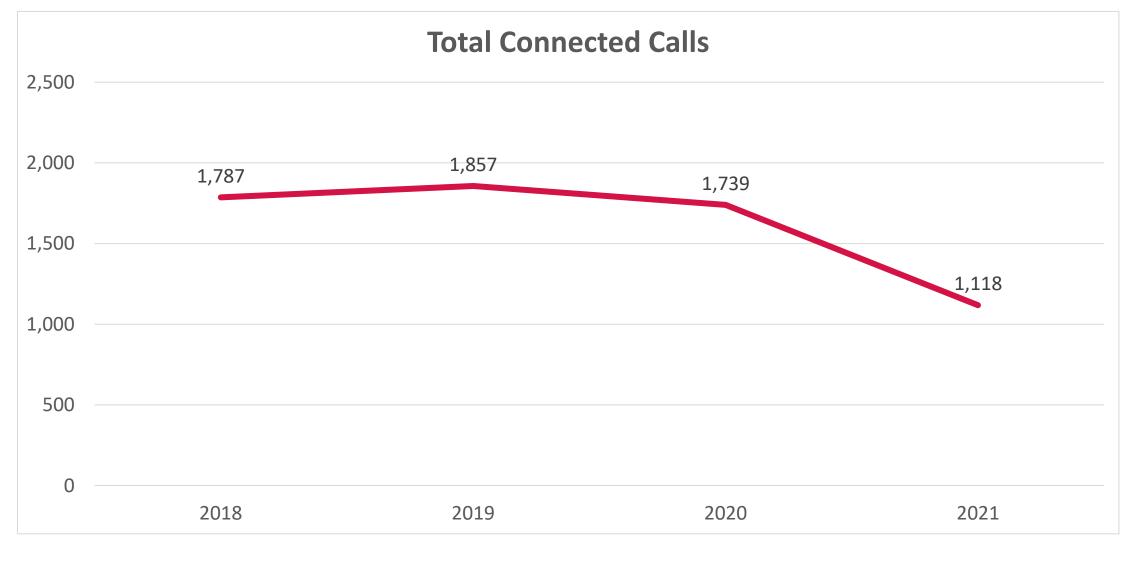
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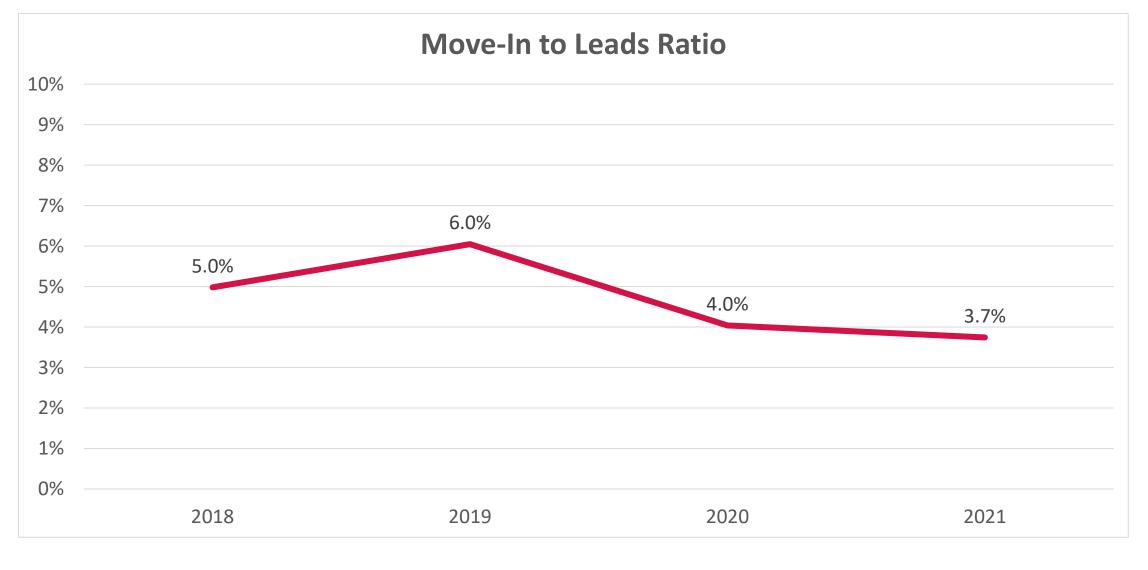
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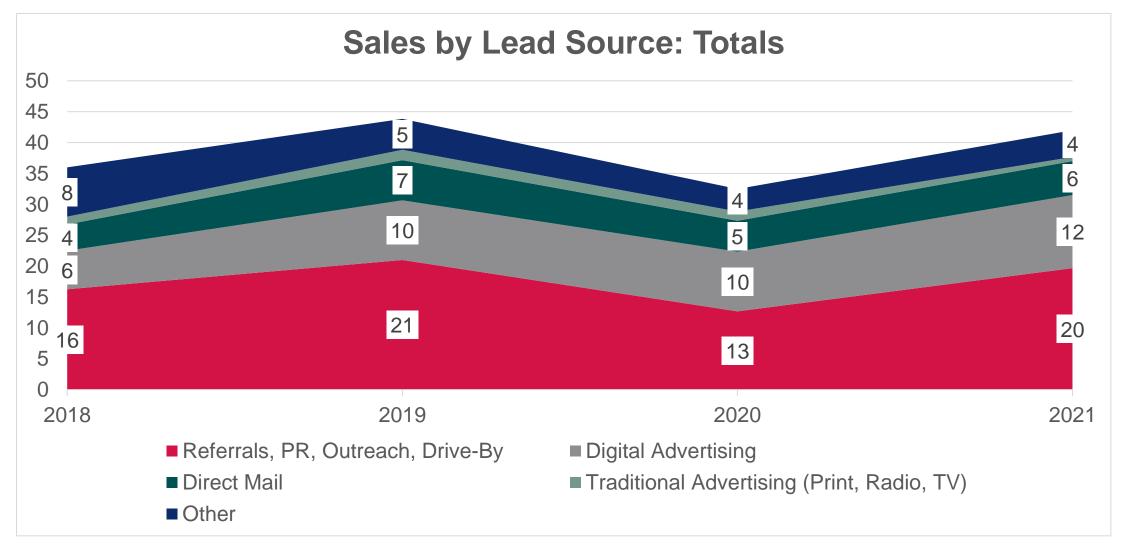
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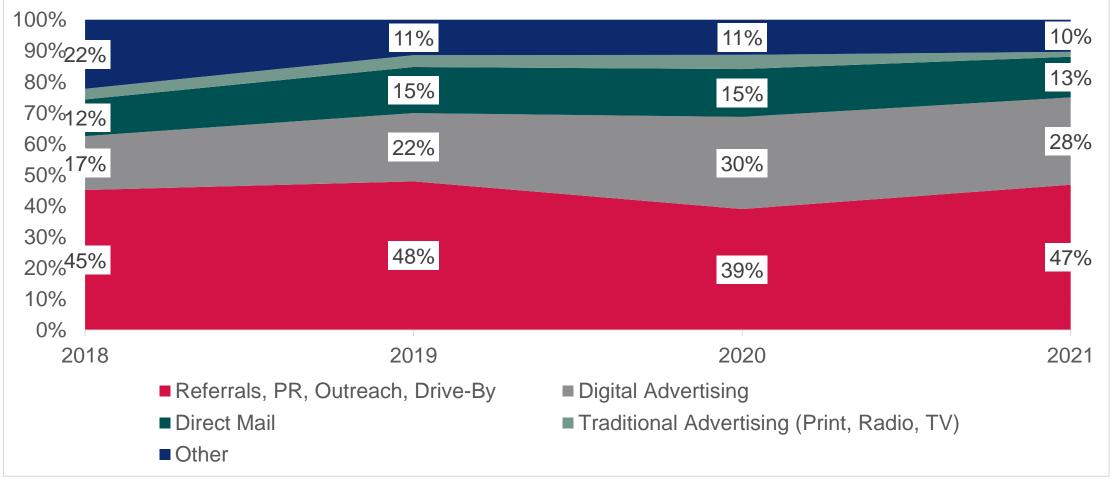
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Sales by Lead Source: Share of Total



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The Key Question

How does senior living marketing and sales need to adapt to most effectively develop relationships with today's digitally sophisticated prospects?

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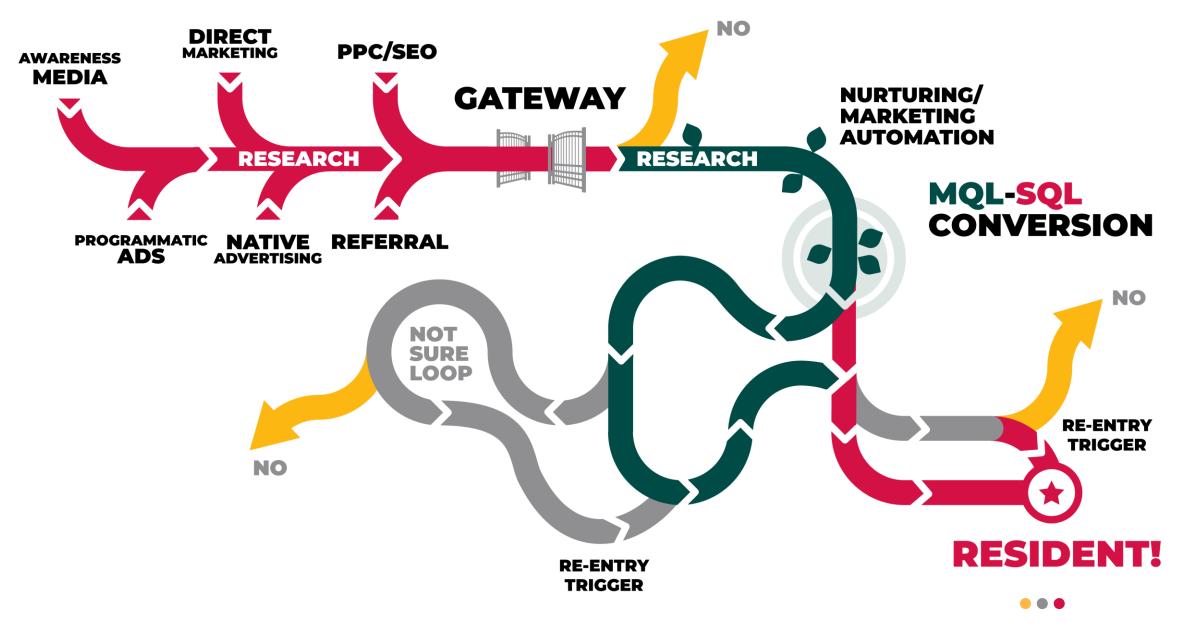
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HELP US HELP YOU



The Senior Living Customer Journey



LA IL Sessions Involving Digital Marketing

- 26-C: 7 Best Practices to Consider When Assessing the Effectiveness of Your Digital Marketing Program
 - Examine the 7 areas that should be systematically reviewed within your digital program.
 - Discover how to translate your findings into strategies that result in keeping your pipeline full.
 - Discuss a digital audit process that will result in generating and nurturing higherquality leads.
- 28-D: How to Gain Momentum During Challenging Times With Your Digital Marketing Program
 - Get tips for positioning your digital marketing strategy
 - Discover how to use advertising, SEO and social media to reach your customers
 - Learn to personalize your virtual sales experience and plan your marketing for the next 30, 60 and 90 days.

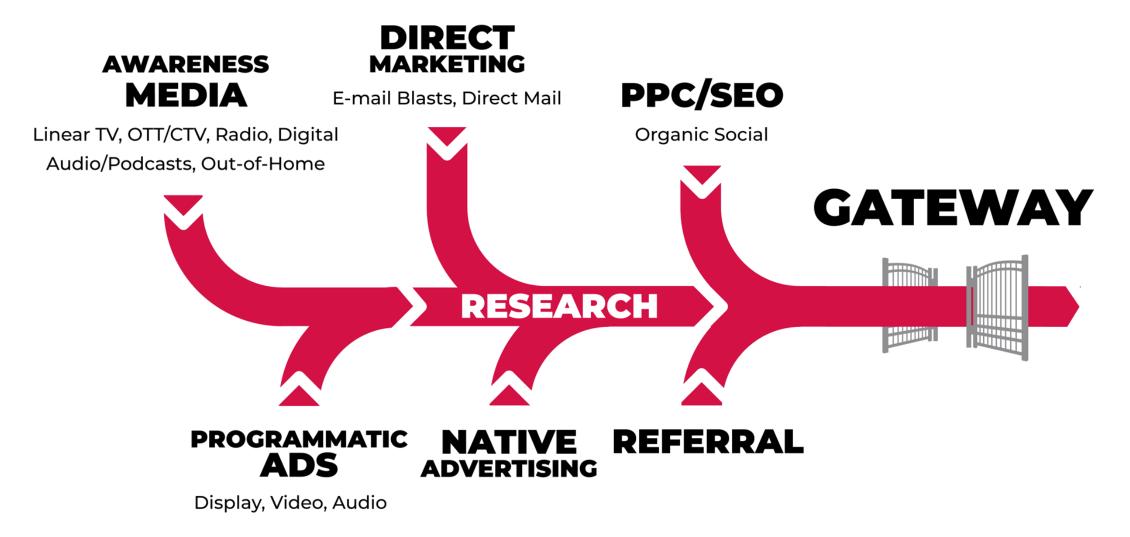
LA IL Sessions Involving Digital Marketing

- ◆ 30-E: Digital Strategies to Online Lead Generation: How To Drive Demand
 - Examine how to draw more visitors to your website and convert them into qualified sales leads.
 - Compare the different types of prospects and where they are at in the buyer's journey.
 - Discuss how to use digital media to strengthen your brand in the eyes of your prospects and stay on their decision-making list.

• 31-F (Us): Integrated Digital Marketing: The New Marketing Workhorse

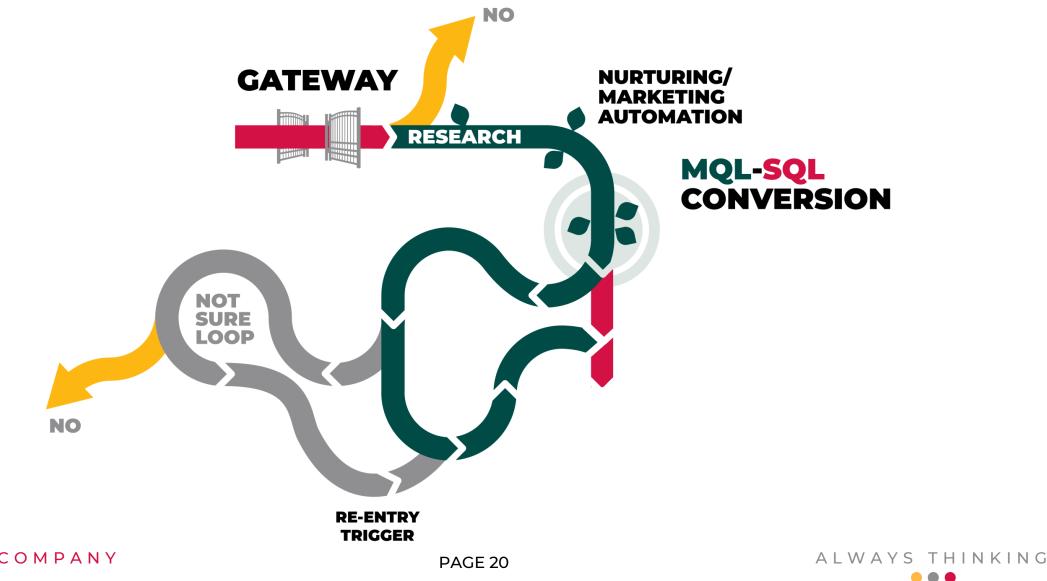
- Define today's customer journey and the best ways to attract prospects to begin the journey.
- Describe how much of the marketing process can be automated to nurture prospects along their journey, leading them to want to engage with the sales team.
- Examine how the sales team's role in the customer's journey is evolving in today's digital world, and the current tools and techniques needed to best engage prospects and help guide their decision making.

Section I: Gateways



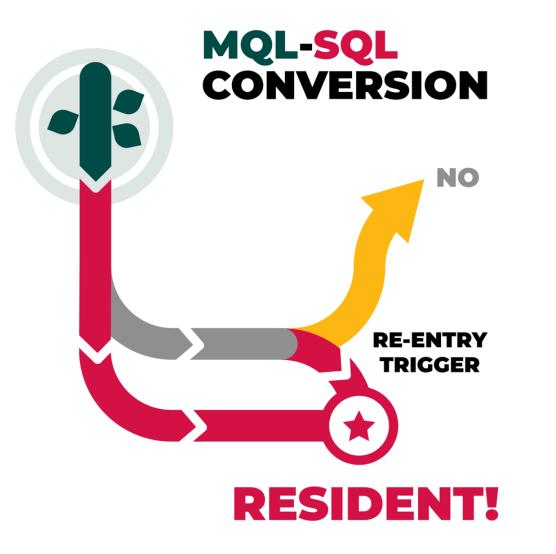
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Section II: Engagement

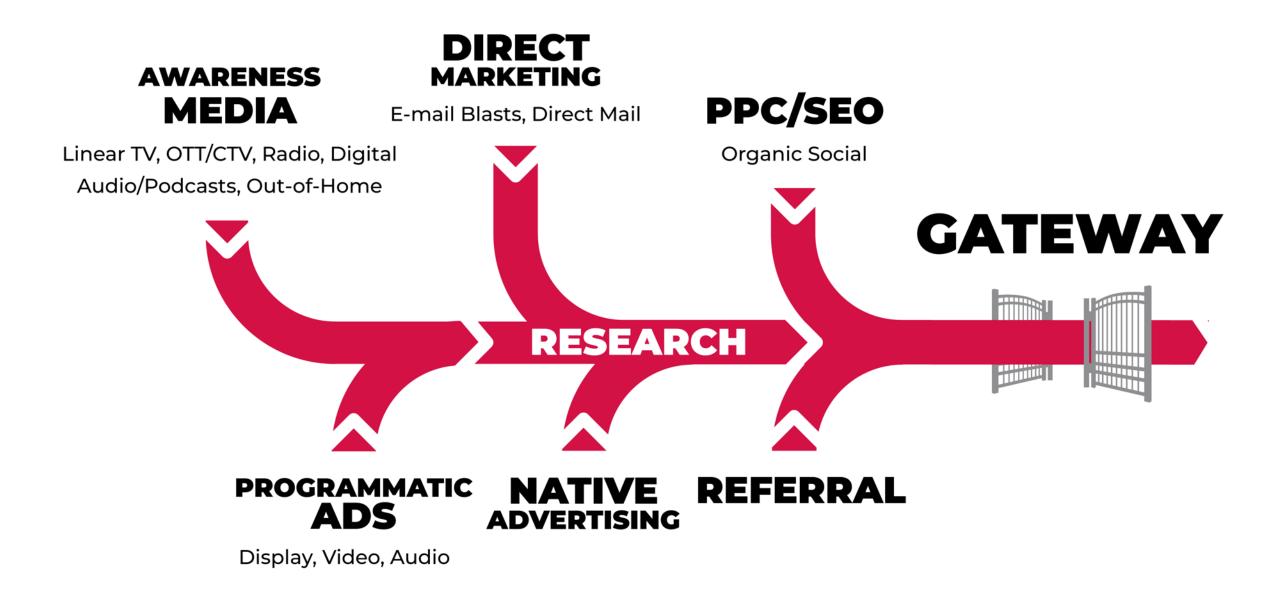


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Section III: Advancing The Sale



GATEWAYS: INVITATIONS TO JOIN THE JOURNEY



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Cast a Wide Net ... But Not THAT Wide



- In video, "linear television" is largely replaced by "Over-the-Top" and "Connected Television" (OTT and CTV)
 - Much more affordable
- Certain radio formats may stay, but digital audio (streaming radio, music services, podcasts) maximizes delivery at lower costs

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Cast a Wide Net ... But Not THAT Wide



- Programmatic display ads add frequency and use AI to optimize message delivery and make the target audience more likely to respond
- Sometimes an outdoor effort is good to add frequency.

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LOVE

the LIFE you LIVE

Learn More

914-461-4517

Cast a Wide Net ... But Not THAT Wide



 Metrics for these efforts are "softer" and include KPIs like main web site traffic lift, time spent on the site, pages viewed, and reduced bounce rates

NKING

We're now hosting safe, in-person events. See more info below!





Beautiful Ideas: The Interior Design of Lakeside at Waterman Village

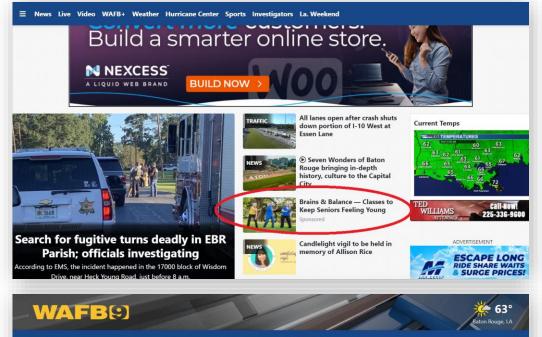
Lakeside at Waterman Village is soon to be one of Florida's top retirement communities. That's because of our progressive living, wellness-focused lifestyle and a wide array of social and educational activities that will be available to residents. Residents will enjoy the common areas on our beautiful campus, featuring interior design by 828 Design. Get to know Keri Moore-Muñiz, and discover her beautiful interior design for Lakeside.





Personalize Awareness With Targeted Efforts

- Purchased direct mail prospecting lists, although it can be expensive
- E-mail blasts, using a third-party server sending to their list, can deliver thousands of e-mail messages.
 - These services can guarantee that all records are double-opt-in.
 - No print costs
 - Delivery costs a fraction of postage



 \equiv News Live Video WAFB+ Weather Hurricane Center Sports Investigators La. Weekend

Brains & Balance — Classes to Keep Seniors Feeling Young

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St. James Place, the popular Life Plan Community for seniors in Baton Rouge, is offering residents a unique program titled "Brains & Balance." Created by staff member John Lopez, the Brains & Balance program is geared toward helping residents maintain an active lifestyle by promoting attention and concentration, short- and long-term memory as well as executive functioning.

The Brains & Balance classes use a combination of games and exercises designed to keep seniors' minds and bodies active and healthy, not to mention upright. "The biggest physical issues you see with older adults," Lopez says, "are either fear of falling or fear of losing their cognitive abilities." His program is designed to help seniors avoid both.

Lopez also uses humor to help keep the residents' minds attuned, using what he calls his "bad joke du jour" to help focus their attention while keeping them amused and relaxed. Deep breathing exercises are also an intrinsic part of the program. According to Lopez, "Research shows that when people are in a good mood and enjoying themselves, it promotes learning." Lopez's research has also shown that diaphragmatic breathing is an excellent tool for clearing the mind, allowing people to focus and concentrate on their mental and physical well-being.

The Brains & Balance program was inspired when Lopez's mother was moved to a long-term care facility. He recognized the need for something the facility didn't provide for patients. Lopez began developing a program he felt would truly help seniors maintain physical and mental health much longer than other programs in use. The program also fits in perfectly with SL James Place's holistic approach to wellness that's meant to nurture the mind, body and spirit of the community's residents.

Lopez sees the development of the Brains & Balance program as an organic process, always changing and growing. He has also created a website, CogworxABC, where he generously shares his work and findings with others. "Doing this work is my passion," he says. "I'm proud to have created something that can truly benefit seniors."

If you'd like to see why so many seniors seeking an active retirement move to St. James Place, click this link or call (225) 215-4510 to arrange a personal tour.

Personalize Awareness with Targeted Efforts

Native advertising encourages users to gain information through the use of content blended into the environment of the content site to make it look and feel like a news story.

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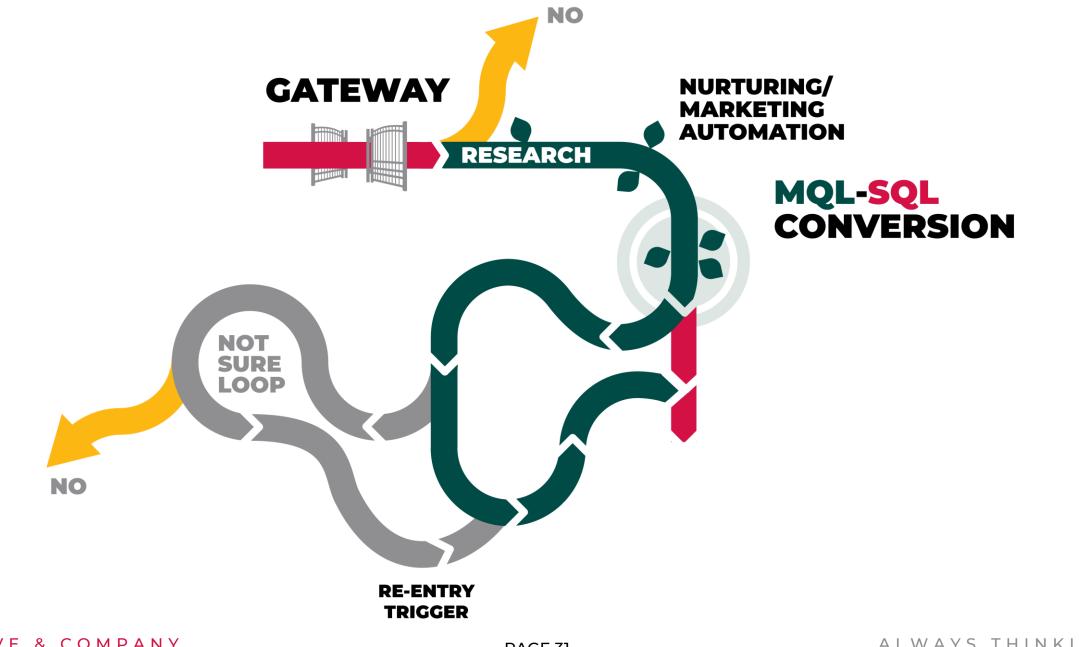
Generating Responses

Be where actively interested users are.

- Search engine optimization drives information-desiring users to the community website.
- Organic social media can invite users to learn more about the community's "personality" and its people.
- Search engine marketing guides users to sales-oriented landing pages.
- Higher awareness levels drive potential members to refer their friends.
- Bring users out of the anonymous cloud to walk through the gateway to become known, interested customers.

ENGAGEMENT: THE MIDDLE OF THE JOURNEY





The (Often) Missing Middle

Salespeople want to jump in and engage with leads at this stage, yet leads may actually resist 1:1 contact.

- Communication should be customer-centric.
- Engagement experiences are fluid across platforms.
- It's important here to start sorting out:

Leads

VS.

- Marketing Qualified Leads vs.
- Sales Qualified Leads





Tools & Tactics in the Middle

Marketing Automation Platform

- Consider this the sales team's Virtual Assistant
- Does not replace a sales counselor (and is not a CRM)!



Tools & Tactics in the Middle

What Is Marketing Automation?

- Drip email campaign
- Programmable, "smart" targeted email campaign
- Lead scoring: based on behaviors such as web visits, asset downloads, form fills, email engagement, chat, etc.
 - You can adjust the scoring criteria to your own community's standards and preferences.

MARKETING AUTOMATION



HINKING

Digital Lead Performance – Enquire Data

Life Plan Communities

Analyzing 300+ locations classified as "LifePlan"

- 2022 digital lead mix = 45% of total leads are coming through the web
- Locations averaged 26 web leads per location per month for 2022 which is up 7% YoY.
- 2022 Inquiry to Move In Conversion = 3% (down 1 pt. YoY)



Digital Lead Performance – Enquire Data

Rental Communities

Analyzing 1,800+ locations classified as IL, AL and/or MC

- 2022 digital lead mix = 38% of total leads are coming through the web.
- Locations averaged 15 web leads per location per month for 2022 which is up 22% YoY.
- 2022 Inquiry to Move In Conversion = 5% (flat YoY)



Tools & Tactics in the Middle

Content Marketing: Critically Important

- Email nurturing campaigns
- Social media campaigns
- Website content
 - Blog articles
 - Cost calculators & worksheets
 - Whitepapers





Tools & Tactics in the Middle

Additional Considerations

- Social proof (reviews & testimonials)
- Chat (and chat bots)
- Webinars, videos, podcasts
- 3D property tours, augmented reality



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Chance Favors the Prepared Brand

Your website is a significant player in the middle

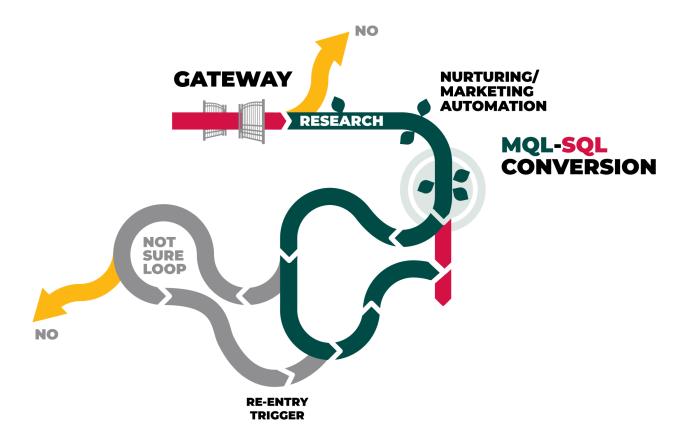
- Focus on setting up a series of "micro yesses" to build a friendly, trustworthy experience.
- Aim for a friction-free UX remove barriers.
- Accessibility and usability allow for ideal UX.
- The devil is in the details: use automations to reinforce actions.
 - Example: people who download a PDF should be served something like a relevant blog article.



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Measure & Optimize in the Middle

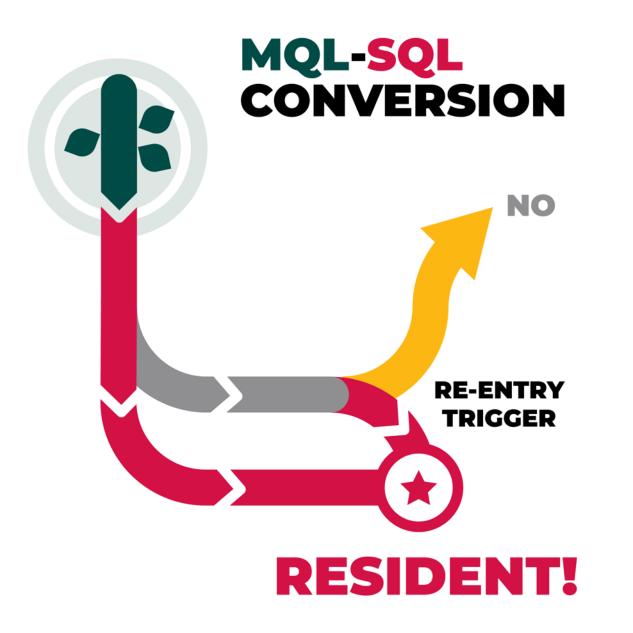
- Your brand may neither need nor want to use all the tactics in the middle.
- Be willing to adjust the sails when a tactic is a clear winner or loser.
- Measurement and lead scoring makes salesqualified leads stand out from the others.



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ADVANCING THE SALE WITH THE DIGITAL PROSPECT







Changing Our Viewpoint



- Who is our lead at this point in their journey?
 - Has sought unbiased information up to this stage
 - Self-directed research on their own timeline
 - Much more educated about senior living
 - They have had a chance to selfqualify.

Changing Our Viewpoint



- Why is change necessary?
 - An attempted phone call is not enough—and now often not possible.
 - We need many more touches, and to use more tools.
 - We need to give our leads the space they need.
 - Let marketing automation do much of the work.

Enhancing Our Mindset

Believe

- The sales team needs to believe that digital leads have value.
- Sales counselors are still needed.
 - Emotions are key to making sales.
 - You are the trusted advisor!
 - Guide prospects on their journey through <u>interactive</u> human connection.



I N K I N G

Enhancing Our Sales Processes

Discovery Goals

- Help people articulate and solve their problem.
- Find the "Why?"
- Encourage the lead to take the next step: Advance the sale.
- Lead them to a resolution: Move to the community?



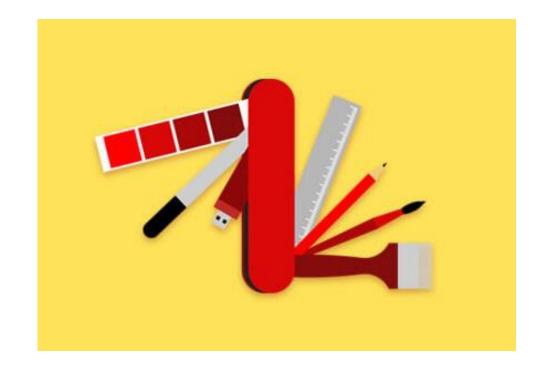
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Sales Toolbox

Digital tools to augment advancing a sale

- Virtual tours—great for early in discovery
- Video messaging—increase conversions, other team members
- Texting services—event reminders, segment to target
- Webinars—possible follow-up opportunity
- Video testimonials
- Click reports—lead scores
- After-tour surveys



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Enhancing Your ROI

What's in your toolbox?

- <u>How</u> to use, <u>when</u> to use, <u>taking it</u> to the next level
 - Are you using your tools to the fullest capability?
 - How do you inspire your teams to use them?
 - Set clear, achievable goals and expectations.
 - Measure success.



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Key Takeaways

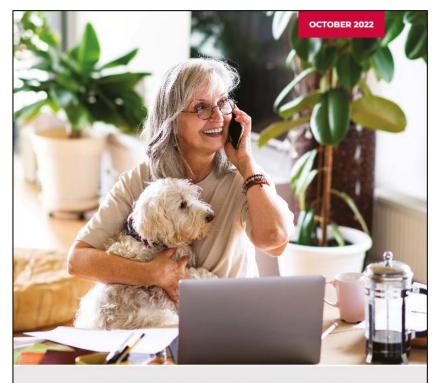
- Senior living as a whole is experiencing the societal changes around technology adoption.
- Digital leads are real and have value!
- The customer journey can be long and "invisible" to the sales team.
- It is imperative to invest in the tools that let us guide and encourage people along the journey.
- Sales teams need to change views about digital leads and evolve tactics to respond to the informed and engaged customer.
- Human connection is still key—with enhanced information!

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Email Us For A Copy Of Our White Paper

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DIGITAL MARKETING AND THE SENIOR LIVING CUSTOMER JOURNEY

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QUESTIONS/ DISCUSSION



EVERY DAY WE HELP SENIORS EXPERIENCE A BETTER LIFE

& COMPANY



THANK YOU!

